

## THE MOCK TRIAL PROGRAM

### Demonstration of a Contested Trust Matter

Money, a disgruntled spouse, children from a prior marriage, questionable bequests, and more money. These are the ingredients of an explosive and dynamic trial.

What happens if after a decedent's death the surviving spouse files a large creditor's claim for separate property reimbursement, other petitions are filed to invalidate alleged questionable bequests and to remove the trustees for self-dealing, breach of fiduciary duty and excess compensation, and all the while significant legal fees are being incurred?

These disputes can arise in your practice for small as well as large trusts and estates. How would you handle these issues at trial?

Don't miss this opportunity to observe experienced probate/trust litigators handle these issues at trial, present arguments incorporating recent case law, examine witnesses and obtain a court decision on the disputes.



STATE BAR EDUCATION FOUNDATION  
Trusts and Estates Section  
180 Howard Street  
San Francisco, CA 94105

## THE MOCK TRIAL PROGRAM

### *Demonstration of a Contested Trust Matter*

PRESENTED BY

THE TRUSTS & ESTATES SECTION  
OF THE STATE BAR OF CALIFORNIA



**Friday, August 1, 2003**

Hyatt Regency San Francisco

5 Embarcadero Center

San Francisco, CA 94111

**Saturday, August 2, 2003**

Hyatt Regency Irvine

17900 Jamboree Road

Irvine, CA

8:15 a.m. to 5:00 p.m.

**8 hours MCLE Credit**

(including 1 hour of Substance Abuse/Emotional Distress credit)

The State Bar of California and the Trusts and Estates Section certify that this activity has been approved for MCLE credit by the State Bar of California in the amount of 8 hours.

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**Saturday, August 2, 2003 • Irvine**

Hyatt Regency Irvine • 17900 Jamboree Road, Irvine, CA

**8:15 a.m. to 5:00 p.m. • Registration begins at 7:30 a.m.**

## REGISTRATION INFORMATION PROGRAM MATERIALS

**DEADLINE:** Your form and check, payable to The State Bar of California, or credit card information must be received by July 18, 2003.

**MAIL TO:** Program Registrations, The State Bar of California, 180 Howard Street, San Francisco, CA 94105. Make checks payable to The State Bar of California.

**FAX TO:** Program Registrations at (415) 538-2368. Credit card information is mandatory.

**ON-SITE REGISTRATIONS:** On-site registrations are on a space available basis only.

**QUESTIONS:** For registration information, please call (415) 538-2206.

**REFUNDS:** All requests for refunds must be in writing and received by July 18, 2003.

**SPECIAL ASSISTANCE:** Please call (415) 538-2206 for special assistance or (415) 538-2231 TDD for speech and hearing impaired.

**TAPE & MATERIALS:** If you would like to order an audio cassette and program booklet, please contact Versa-Tape Company at (800) 468-2737. Cost for the tape and booklet is \$170. MCLE self study only.

## AGENDA AND PARTICIPANTS

7:30 a.m.	to	8:15 a.m.	Registration
8:15 a.m.	to	8:30 a.m.	Introduction
8:30 a.m.	to	10:15 a.m.	Trial Proceedings
10:15 a.m.	to	10:30 a.m.	BREAK
10:30 a.m.	to	11:50 a.m.	Continuation of Trial
11:50 a.m.	to	1:30 p.m.	LUNCH WITH SPEAKER
1:30 p.m.	to	2:50 p.m.	Continuation of Trial
2:50 p.m.	to	3:05 p.m.	BREAK
3:05 p.m.	to	5:00 p.m.	Continuation of Trial, Closing Arguments, Judge's Ruling

This full day program will be a mock trial of a litigated trust dispute – the attendees will receive copies of pleadings with arguments artfully presented as well as observe practical hands-on demonstration of trial techniques.

### IN SAN FRANCISCO

Judge: Hon. Commissioner Don E. Green (Contra Costa Superior Court)

### TRIAL COUNSEL AND WITNESSES:

Bette B. Epstein (Reed Smith Crosby Heafey, LLP, Oakland)  
Neil F. Horton (Horton Roberts et al., Oakland)  
Mary F. Gillick (Luce, Forward, Hamilton & Scripps LLP, San Diego)  
Adam F. Streisand (Loeb & Loeb, Los Angeles)  
Paul J. Barulich (Barulich Law Group, San Mateo)  
Keith P. Bartel (Carr, McClellan, Ingersoll, Thompson & Horn, Burlingame)  
Tracy M. Potts (Legacy Law Group, Sacramento)

### LUNCHEON SPEAKER:

“Thriving: Coping Successfully With the Stress of Legal Practice.”  
Richard P. Carlton  
(Deputy Director – California State Bar Lawyer Assistance Program)

### IN IRVINE

Judge: Hon. Arnold H. Gold (former Probate Judge, LA Superior Court)

### TRIAL COUNSEL AND WITNESSES:

Adam F. Streisand (Loeb & Loeb, Los Angeles)  
Mary F. Gillick (Luce, Forward, Hamilton & Scripps LLP, San Diego)  
Bette B. Epstein (Reed Smith Crosby Heafey, LLP, Oakland)  
Neil F. Horton (Horton Roberts et al., Oakland)  
Craig C. Alexander (Self & Bhamre, Newport Beach)  
Jessica Dorman-Davis (Freeman, Freeman & Smiley LLP, Irvine)  
Kenneth S. Wolf (Hoffman, Sabban & Watenmaker, Los Angeles)

### LUNCHEON SPEAKER:

“Thriving: Coping Successfully With the Stress of Legal Practice.”  
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**Please check the program location you wish to attend:**

☐ Friday, August 1, 2003 • Hyatt Regency, San Francisco

☐ Saturday, August 2, 2003 • Hyatt Regency, Irvine

**Note:** Please use a separate form for each registrant

Name \_\_\_\_\_

State Bar Number \_\_\_\_\_

Firm \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Phone \_\_\_\_\_

E-mail \_\_\_\_\_

### REGISTRATION FEES (Check appropriate box)

☐ \$240 Members of the State Bar of California  
Trusts and Estates Section

☐ \$300 Non-Members  
☐ Please credit \$60 of my non-member registration fee to  
my 2003 membership dues in the Trusts and Estates Section

### CREDIT CARD INFORMATION

I authorize The State Bar of California to charge my program registration to my VISA or MasterCard account. (No other credit card will be accepted.)

Account Number \_\_\_\_\_ Exp. Date \_\_\_\_\_

Card Holder's Name \_\_\_\_\_

Cardholder's Signature \_\_\_\_\_

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